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## INTERNATIONAL MIGRATIONS OF POLISH PENSIONERS IN THE CONTEXT OF THE CUMULATIVE CAUSATION THEORY

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### Abstract

Nowadays we deal with both rapid population ageing and considerable increases in international migrations of people over 65. Consequently, the aim of this paper is to present the destinations Polish pensioners choose when moving abroad. The most popular destination country is Germany, which results from the family networks binding pensioners with this country. This fact is confirmed by the cumulative causation theory, which argues that a combination of several factors is necessary for migrations to occur. Pensioners face low incomes, and after retirement they seek opportunities to raise them. However, going abroad to work is not easy due to lack of knowledge of foreign languages. Mobility is facilitated by existing migration networks, i.e. migrants move to join their families and friends.

### Keywords:

Migration, migration of retirees in Poland, directions of migration, Cumulative causation theory

## INTRODUCTION

In the 21st century, population ageing occurs at a high pace. In the developed countries this phenomenon has been observable for many years: since 2004, seniors in Europe have outnumbered the youngest population aged 14 and less (Alén et al. 2012). Statistics show that in 2020, 25% of EU citizens will be 60 or older, and the number of pensioners will grow every year. This phenomenon will be a serious burden for the social insurance system, healthcare and welfare services. In Poland, likewise, the demographic balance is negative and population ageing is a noticeable trend. According to the Main Statistics Office, in 2017 Poland is inhabited by almost 9 million people who have reached the retirement age and they account for over 20% of the whole Polish population.

Another phenomenon of similar importance as population ageing are migrations (e.g. Molnár 2017, Bujdosó et al. 2016). Worldwide, as stated by Ptak (2012),

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about 27 million of migrants who are 65 and older move from one country to another nowadays, which accounts for almost 13% of all international mobility.

Consequently, it seems worthwhile to describe the destinations of international migrations by Polish pensioners and the major motivation for their mobility, which is the aim of this paper. It is hypothesized that, in contrast to pensioners from Western Europe, Polish pensioners do not go abroad with tourism in mind, but for economic reasons.

The research focuses on people who have reached the legal retirement age (60 for women and 65 for men in Poland), and they will be referred to as pensioners or seniors throughout the paper. The period under analysis covers the years after the economic transformation, i.e. 1990-2016.

## **THEORETICAL BACKGROUND**

The cumulative causation theory (Massey at al. 1993), combining elements of a number of various other theories, is one of the major sociological approaches to migration. It assumes that migration waves are stimulated directly, showing that a few reasons have to coincide for migrations to occur. As argued by Górny and Kaczmarczyk (2003), the cumulative causation theory is based on the notion of the social capital and it is devoted to migration dynamics. The author of this theory focuses on the development of the migration process, its reasons and consequences of subsequent migrations. According to Massey, each individual migration creates networks (social capital) among people with whom the migrant is somehow connected, and this increases the probability of further migrations from the same society. When the networks (social capital) are well-developed, a migrant is able to profit the most from his/her migration. The author calls this cumulative causation. Górny and Kaczmarczyk (2003) enumerate possible reasons for migrations:

- 1) development of connection networks,
- 2) changes in the structure of income distribution,
- 3) changes in land selling and buying,
- 4) changes in agriculture, especially introduction of machines,
- 5) changes in values and in perceptions of mobility,
- 6) changes in incomes,
- 7) social perception of work.

The fact that Massey defined these reasons is very significant, because it becomes obvious that drawing conclusions about migration exclusively on the basis of the "classical" economic factors (such as differences in wages) may be very confusing.



## DATA

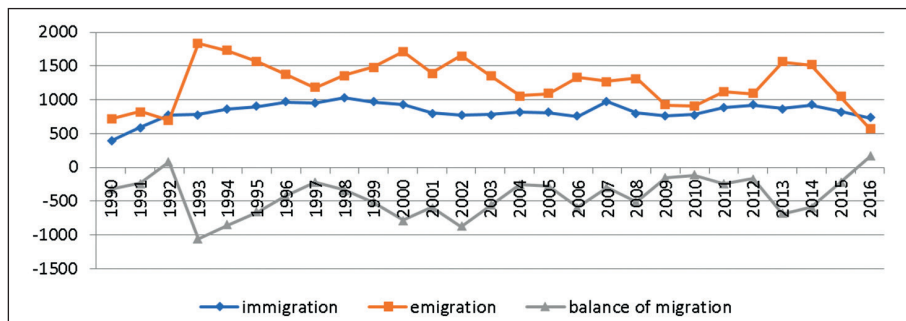
This study makes use of quantitative analysis of secondary sources. The research involved taking stock of available on-line and published sources of data, and purchase from the Main Statistics Office of the data on migrations of Polish pensioners in the years 1990-2013. We may assume that these data might slightly underestimate the phenomenon, as not every migrant has registered his/her mobility in accordance with the legal regulations. However, this underestimation is probably considerably smaller for seniors than for younger, working-age migrants.

## RESULTS

The process of migrating abroad by Polish seniors has varied over time. Until 1992, it stayed at the level of about 800 emigrants annually. 1993 displays a sudden peak with the outflow of 1837 persons, and since then the outflow rate has been decreasing until 2010, with some small fluctuations. It is mainly emigration by women that is responsible for this variety, as emigration by men has stayed at the constant level of about 300 persons annually.

Until 1989, going abroad was very difficult for Poles, and this is true not only for work-related mobility, but also for tourism. When it became possible to go abroad, young Poles as well as seniors seized the opportunity to seek better income. Just like young people, pensioners also wanted to work abroad, in particular those pensioners who, due to their profession, had been able to retire early. In addition, 1993 was the year when many people born before World War II, during the baby boom, became entitled to retire. This also contributed to the high number of emigrants.

The migration balance for emigrations and immigrations is negative, except for 1992 and 2016. The lowest value was recorded in 1993 and it amounts to -1055 persons (see Figure 1). This shows that Polish pensioners were likely to choose life outside the borders of Poland.



**Figure 1** Inflow and outflow of pensioners from Poland and the migration balance for the years 1990-2016, in persons

*Source: prepared by the author on the basis of data from the Main Statistics Office*



## EMIGRATION OF POLISH PENSIONERS

Germany is the most popular destination country among Polish pensioners: in the years 2001-2005, as many as 4695 moved there (see Table 1). The dominance of Germany over other migration destinations is very clear, for example only 336 persons moved to the USA, and 168 – to Canada in the same period.

**Table 1** Total emigration of Polish pensioners in the years 2001-2005 and 2006-2010

| COUNTRY       | Total number of emigrants in years 2001-2005 | COUNTRY       | Total number of emigrants in years 2006-2010 |
|---------------|--|---------------|--|
| Germany       | 4695   | Germany       | 4066   |
| United States | 336  | United States | 704  |
| Canada        | 168  | Canada        | 245  |
| Australia     | 52   | Great Britain | 115  |
| Sweden        | 44   | Australia     | 107  |
| France        | 37   | France        | 93   |
| Great Britain | 35   | Sweden        | 84   |
| Austria       | 27   | Austria       | 59   |
| Italy         | 12   | Italy         | 41   |
| Czechia       | 10   | Belgium       | 23   |
| Denmark       | 8  | Spain         | 22   |
| Greece        | 7  | Czechia       | 22   |
| Switzerland   | 6  | Netherlands   | 22   |
| Ukraine       | 6  | Greece        | 19   |
| Netherlands   | 4  | Switzerland   | 18   |

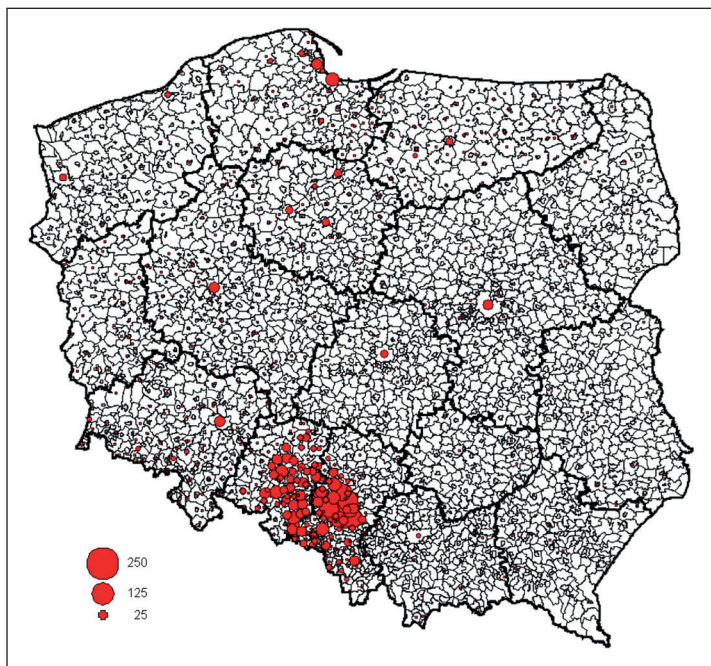
*Source: prepared by the author on the basis of data from the Main Statistics Office*

Likewise, also in the years 2006-2010 emigration to Germany was clearly the biggest, amounting to 4066 migrants (Table 1). The USA and Canada gained more popularity than before, attracting 704 and 245 migrants, respectively. This resulted from facilitated visa procedures and improving knowledge of English.

The outflow of pensioners to Germany has been high throughout the whole period under analysis. This results from many factors, among others from geographical closeness, the high standard of living and the early migration of their children. Easy availability of jobs for pensioners also plays a significant role. A great advantage, especially for the youngest pensioners, is the possibility to obtain a German pension. The basic pension can be obtained by a person who has reached the retirement age and has worked in Germany for 60 months. This right



has often been used by coal miners. It is observable that in the years 2006-2010 the pensioners who migrated to Germany mainly came from the Silesian and Opole Provinces (see Figure 2).



**Figure 2**

Municipalities from which pensioners emigrated to Germany in 2006-2010  
(Total number in persons)

*Source: prepared by the author on the basis of data from the Main Statistics Office*

#### EMIGRATION OF PENSIONERS FROM WESTERN EUROPE

International migrations of pensioners are observable in various regions all around the world. In Europe, pensioners from the north tend to move to the Mediterranean, especially to Portugal, Italy, Greece, Turkey, and Spain. In addition, also Oceania, Australia, New Zealand and countries of Eastern Asia enjoy some popularity as migration destinations. Migrations are facilitated by the fact that pensioners from Northern Europe can afford to buy homes and land abroad, and the main driving forces are warm climate, beautiful landscapes as well as healthier and slower pace of life in the destination countries (Rodriguez et al. 1998, King et al. 1998). This is confirmed by the study by Longino and Bradley (2001), who compared migrations of seniors in Japan, Italy, Great Britain and the USA and noted that as societies become more prosperous, mobility of seniors drives them to the mildest climate zones.





Comprehensive studies on this topic are rare, and the more important ones include the work of Warnes (1994), who uses secondary data to show the growing importance of the south of Europe as a migration destination for pensioners from Northern Europe. Also the study by Jurado and Sánchez (1990) presents the economic consequences of immigration by Northern Europeans to Mijas (Costa del Sol), one of the most densely populated municipalities in Spain. Research carried out in Mijas by Jurado and Sánchez (1990) shows a significant share of seasonal migrants, because as many as 44% of their respondents stayed outside Spain for more than three months each year. Also Myklebost (1989) estimates that 15 thousand Norwegians spent the whole winter 1987/88 or its significant part in Spain. Such seasonal migration may be the first step towards permanent migration (Cribier 1980). Valenzuela (1991) calculates that there are more than 500 thousand foreign owners of second homes in Costa del Sol and Costa Blanca, half of them being British and the other half – German.

Research on all types of British buyers of fixed property in France was conducted by Buller and Hoggart (1992, 1994, 1995). Their studies show that the number of purchases by Britons rapidly increased from 2 thousand in 1980 to 14 thousand in 1989. Estate agencies played the key role in attracting buyers to particular regions and municipalities (Williams, King, Warnes 1997).

## DISCUSSION

Research carried out in developed countries, among others by Deller (1995), focuses on the economic contribution of pensioner migrants. Deller discusses policies aimed at increasing the number of pensioners coming to Maine. The study is based on the Regional Economic Models. Comparing the simulated influence of such policies with the baseline level, economic multipliers are generated, which can be used for future analyses of policies.

Haas and Serow (1993), in turn, created a heuristic model of pensioner migration and validated it using questionnaire data from 586 migrants to the western part of North Carolina.

Research by Williams and Jobes (1990) shows a strong connection between the reasons for mobility as such and the reasons for choosing the Gallatin Valley. They also discovered a correlation between the socioeconomic status of respondents and their reasons for mobility. Families with higher status identified economic factors and the standard of living as the main reasons for choosing the Gallatin Valley, whereas families with lower status only mentioned the standard of living. This research shows the roles played by economic motivations as well as standard of living expectations, the latter being of particular importance for migrants with lower social status. This may signal the emergence of migrations in which the search for a higher standard of living is the main motivation, while economic security remains an important aspect for some migrants.



Kakaš and Bleha (2017) analyze migrations of seniors in the Slovakia, using detailed migration data and describing variations of such migrations throughout the last 25 years. Applying statistical regression models, they identify important migration factors. They also show the degree to which senior migrants are selective and the degree to which seniors reflect the general migration tendencies related to the economic transformation.

Spatial behaviours of Polish emigrants are closer to the ones of pensioners from the Slovakia. Polish pensioners predominantly choose Germany as their migration destination. During the decade 2001-2010, over 8.7 thousand Polish seniors moved to Germany. The total result is more than 8 times higher than the equivalent emigration data for the next most popular destination country, i.e. the USA (1040 persons). This is not surprising, considering the difficulties faced by Polish migrants to the USA, such as the necessity to obtain the US visa and a tiring plane journey, which may constitute a health risk for seniors.

Another important issue is the fact that Polish migrants moving to Germany predominantly come from the region which has very strong historical links to Germany. Figure 1 shows that these migrants had inhabited Upper Silesia and the Opole Region before they moved. This area belonged to Germany before World War II, and inhabitants of Upper Silesia and the Opole Region often have family and friends in Germany, whom they join in the first place. They undertake work taking care of their own grandchildren, but often their poor financial condition makes them seek employment as caretakers of unrelated seniors. Official statistics show that in 2009 the Polish Social Insurance Office (ZUS) transferred abroad 25 thousand pensions, and in 2014 – already 43 thousand. We must at the same time bear in mind that many migrants do not ask for international transfers. Numerous migrants are young pensioners who retired from professions enabling early retirement, i.e. coal miners, soldiers, police officers, etc. Their migrations, however, are not reflected in our statistics that focus on age, and often they are only temporary.

International mobility of Polish pensioners has been discussed, among others, by Kałuža-Kopias (2015), who points out that elderly migrants move outside Europe much more often than young people (aged 20-34). In the years 2002-2013, about 90% of Polish emigrants aged 20-34 settled in Europe, whereas the equivalent share among migrants aged 65 and more amounted to 75-80%. Seniors aged 65 and more were 1.7 times more likely to settle outside Europe than Poles aged 20-34. Unlike young migrants, seniors were much more likely to choose Germany or the USA rather than Great Britain. In 2013, 58% of Polish senior emigrants (aged 65 and more) moved to Germany, and only less than 6% moved to Great Britain. Among emigrants aged 25-29, however, 35% moved to Germany and 30% to Great Britain.

As argued by Hołowiecka and Grzelak-Kostulska (2012), poverty is less widespread among pensioners than among families raising children. This is confirmed, among others, by Szukalski (2008) and Szatur-Jaworska (2010): the relative prosper-





ity of the elderly, as compared with other groups, has improved in Poland over the last 20 years. Szatur-Jaworska (2010) states that the average income of pensioner households amounts to about 100-105% of the overall average income. In 2015, the average pension paid by the Polish Social Insurance Office (ZUS) amounted to almost 2100 PLN, while half of the pensioners received 1800 PLN and less.

**Table 2** Average income from pensions in selected EU countries in 2014 (in EUR)

| ORDER | COUNTRY       | WOMEN PENSION (in EUR) | MEN PENSION (in EUR) |
|-------|---------------|------------------------|----------------------|
| 1     | Luxembourg    | 2207                   | 4017                 |
| 2     | Austria       | 1530                   | 2498                 |
| 3     | Netherlands   | 1356                   | 2239                 |
| 4     | Sweden        | 1509                   | 2146                 |
| 5     | Denmark       | 1962                   | 2126                 |
| 6     | France        | 1263                   | 1970                 |
| 7     | Germany       | 1035                   | 1871                 |
| 8     | Ireland       | 1171                   | 1859                 |
| 9     | Finland       | 1356                   | 1849                 |
| 10    | Belgium       | 1209                   | 1754                 |
| 11    | Italy         | 1126                   | 1669                 |
| 12    | Great Britain | 1004                   | 1662                 |
| 13    | Spain         | 831                    | 1255                 |
| 14    | Greece        | 712                    | 953                  |
| 15    | Slovenia      | 673                    | 890                  |
| 16    | Portugal      | 606                    | 880                  |
| 17    | Malta         | 627                    | 761                  |
| 18    | Czechia       | 432                    | 502                  |
| 19    | Poland        | <b>358</b>             | <b>474</b>           |
| 20    | Slovakia      | 390                    | 422                  |

*Source: prepared by the author on the basis of [www.ec.europa.eu](http://www.ec.europa.eu)*

Nevertheless, when we compare Poland with Western Europe, where the average pension amounts to about 2000 EUR, Polish pensions are much lower and they only score the 19<sup>th</sup> position within the ranking. Consequently, instead of migrating to the Mediterranean, which offers wonderful climate and numerous tourist attractions, Polish seniors are compelled to migrate to countries where they can improve their finances (see Table 1).

This fact is confirmed by the cumulative causation theory (Massey et al. 1993), which argues that several reasons are necessary for migrations to occur, such as

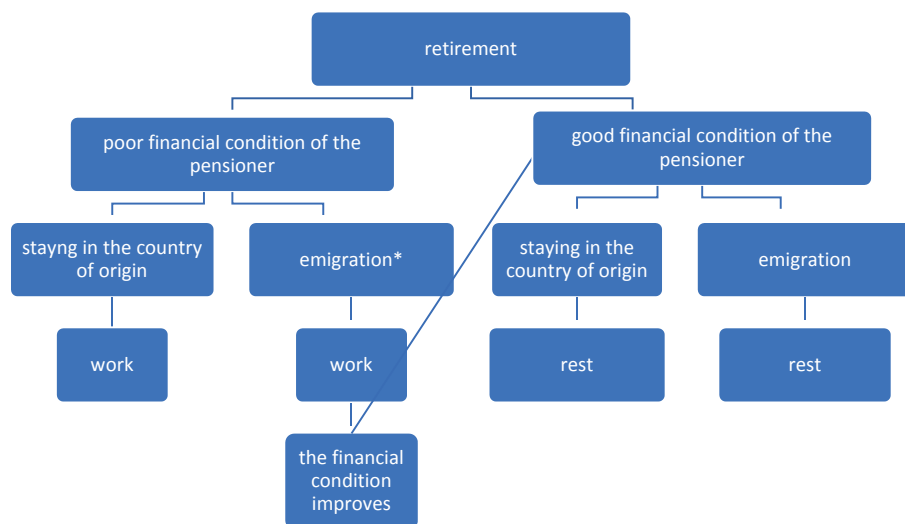


growing differences in the standard of living, decreasing supply of land in the countryside, emigrants' desire to keep up a higher standard of living, existing migration networks. In the case under analysis, we deal with growing divergence in the standard of living and existing migration networks. Pensioners face low incomes, and after retirement they seek opportunities to raise them. Although going abroad to work is not easy due to lack of knowledge of foreign languages, it can be facilitated by the existence of migration networks. Emigrants move to join their families and friends.

## CONCLUSIONS

The increasing role of pensioners in the society and pension security create favourable conditions for research in many European countries. However, migrations of seniors constitute a new research field in Central and Eastern Europe. Poland has been characterized by a negative immigration and emigration balance among seniors, which has become more acute after 1992. This results first of all from economic factors, such as seeking new employment and seniors' desire to improve their standard of living. Migrations are facilitated by existing connection networks between the migrants' former domiciles and their destinations.

Figure 3 illustrates the above considerations. After retiring, each senior chooses between two paths, and the decision depends on his/her financial condition. S/he may stay in the country of origin or move abroad. The former may be connect-



\*functioning migration networks are a precondition for migration

**Figure 3** Possible choices pensioners can make after retirement

*Source: author*



ed with employment in a sector of the so-called “silver economy”, but the latter guarantees a faster improvement of the finances. For seniors, moving abroad is difficult due to lack of knowledge of foreign languages and fears related to living in a foreign environment. These obstacles may be overcome by means of the existent migration networks, which usually come in the form of family and friends living abroad. Thanks to them, a senior is not afraid of mobility, because they provide him/her with accommodation and the first job. When the financial condition of the pensioner migrant improves, s/he will usually return to the home country and face the same choice that a person with a satisfactory financial condition makes after retirement. Such pensioners also have two paths to choose from: staying in the country of origin or going abroad. In this case, however, pensioners may have a rest, as they do not need to seek additional employment.

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